Connect from Tableau step by step

Date: August 2016
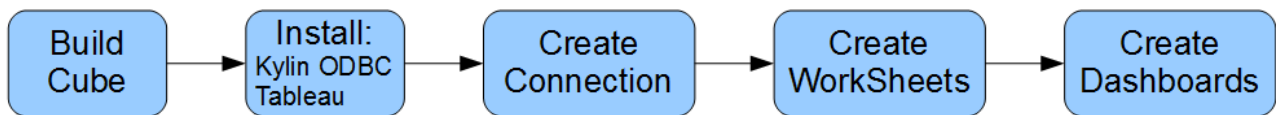
Update: March 2017

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Intro

[Quick Start with Sample Cube](#) can be used with Kylin Project to make an example of integration with Tableau Software

Pre-requisites

First, you need to Build Kylin Cube: [Quick Start with Sample Cube](#), and check the result cube executing:

select part_dt, sum(price) as total_selled, count(distinct seller_id) as sellers from kylin_sales group by part_dt order by part_dt

Results (731)

PART_DT	TOTAL_SELLE...	SELLERS
2012-01-01	466.9037	12
2012-01-02	970.2347	17
2012-01-03	917.4138	14

Second, Install [Tableau Desktop 9.3.3](#) on Windows

Used Software

- [Kylin: 1.5.2](#)

- [Kylin ODBC 1.5](#) (Don't use v1.3, it doesn't work)
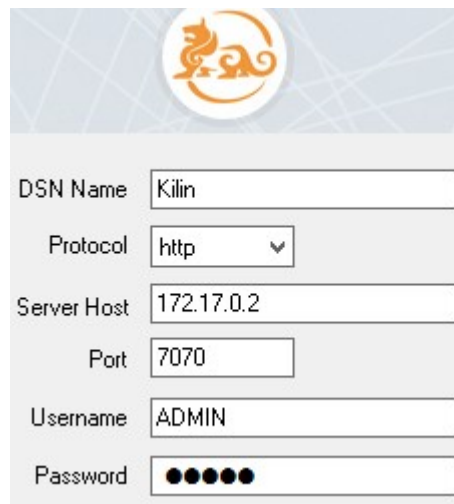
- [Tableau Desktop 9.3.3](#)

(Update Nov 2016) Tested with Kylin 1.6.0 and Tableau Desktop 10.1.1 and it works without problems. If you use the twb files from my GitHub, you will be prompted to convert to a new version (and you will not be able to open this file with previous versions)
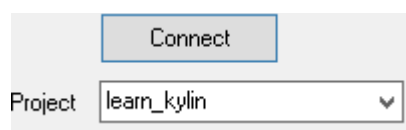
Create Connection

1. [Install Kylin ODBC](#)

2. Add DNS System in Windows
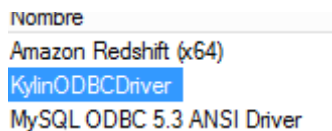
3. And configure: User-name /Password: ADMIN / KYLIN

4. Click Connect and Choose the project

5. Click on "Done"

6. Download and install Tableu Desktop and launch it

7.

8.

9. Complete details connections (ADMIN /KYLIN), click done, click OK:

Protocol	http
Server Host	172.17.0.2
Port	7070
Username	ADMIN
Password	•••••

Connect

| Project | learn_kylin |

10. Click on Select Database ▾ > defaultCatalog ▾ > Enter table... 🔍 ➕ (In **magnifying glass**)

The result should be three new tables (on left panel):

◉ Exact   ○ Contains   ○ Starts with

⊞ KYLIN_CAL_DT (DEFAULT.KYLIN_CAL_DT)

⊞ KYLIN_CATEGORY_GRO...ATEGORY_GROUPINGS)

⊞ KYLIN_SALES (DEFAULT.KYLIN_SALES)

NOTE: Sometimes it doesn't work correctly, Solution: close and open Tableau :)

11. Add these tables to Tableau: Drag and Drop to *Drag tables here*

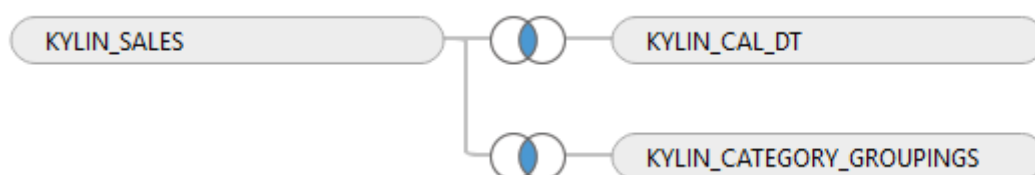- First "Kylin_sales" (Fact Table) and second "Kylin_Cal_DT" (Dimension table)

KYLIN_SALES —◉— KYLIN_CAL_DT

And Join Relation:

Data Source		KYLIN_CAL_DT
Part Dt	=	Cal Dt

- Now do the same with "Kylin_Category_Groupings"

Data Source		KYLIN_CATEGORY_GROUPI...
Leaf Categ Id	=	Leaf Categ Id (Kylin Cate...
Lstg Site Id	=	Site Id

- The result should be:

KYLIN_SALES —◉— KYLIN_CAL_DT
            └◉— KYLIN_CATEGORY_GROUPINGS

- Now if you click: **Update Now** , you should see this data table:

Week Beg Dt	Cal Dt	User Defined Field1	User Defined Field3	Upd Date	Upd User
KYLIN_CAL_DT	KYLIN_CAL_DT	KYLIN_CATEGORY_GROUPINGS	KYLIN_CATEGORY_GROUPINGS	KYLIN_CATEGORY_GRO...	KYLIN_CATEGORY_GR...
01/01/2012	01/01/2012	11	Collectibles	2012-09-11 20:26:...	USER_Y
01/01/2012	01/01/2012	4	Business (Office & Ind...	2013-04-28 20:37:...	USER_Y
01/01/2012	01/01/2012	9	Apparel	2013-09-10 16:52:...	USER_Y
01/01/2012	01/01/2012	9	Apparel	2013-07-16 08:23:...	USER_Y
01/01/2012	01/01/2012	12	Computers	2012-05-01 08:54:...	USER_Y
01/01/2012	01/01/2012	11	Collectibles	2008-06-03 13:36:...	USER_Y
01/01/2012	02/01/2012	0	Apparel	2012-00-11 20:26:	USER_Y

Intro to Sheet Elements

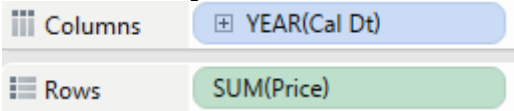Go to Sheet 1: Sheet 1

You should see the Dimensions in left panel

And measures:

The First WorkSheet
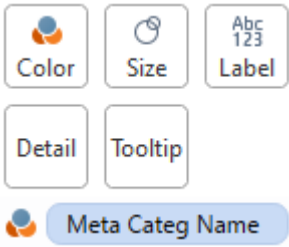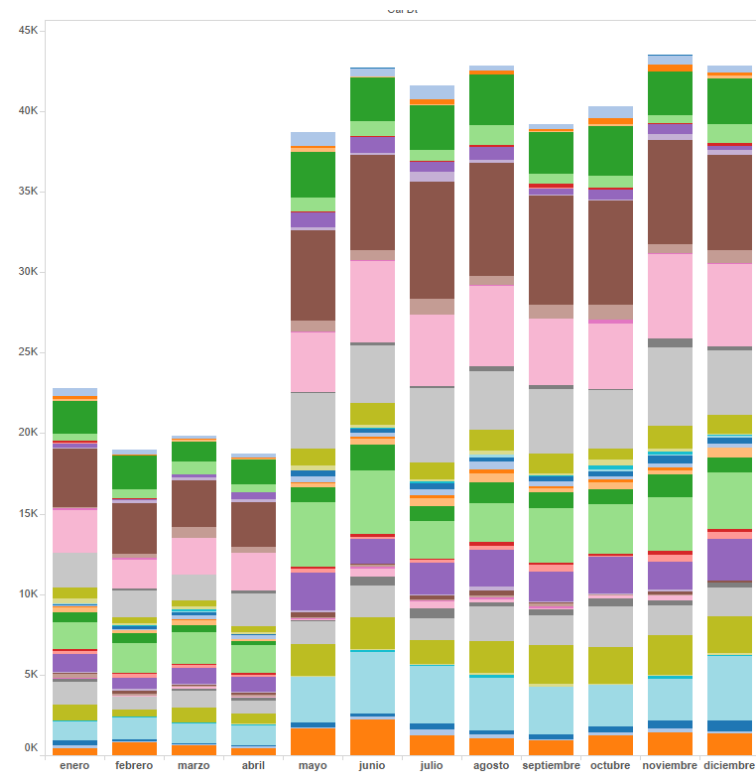
Drag and Drop "Cal_Dt" and "Price" like in picture:

To expand to Quarter and Months: Click on "Plus" of year:
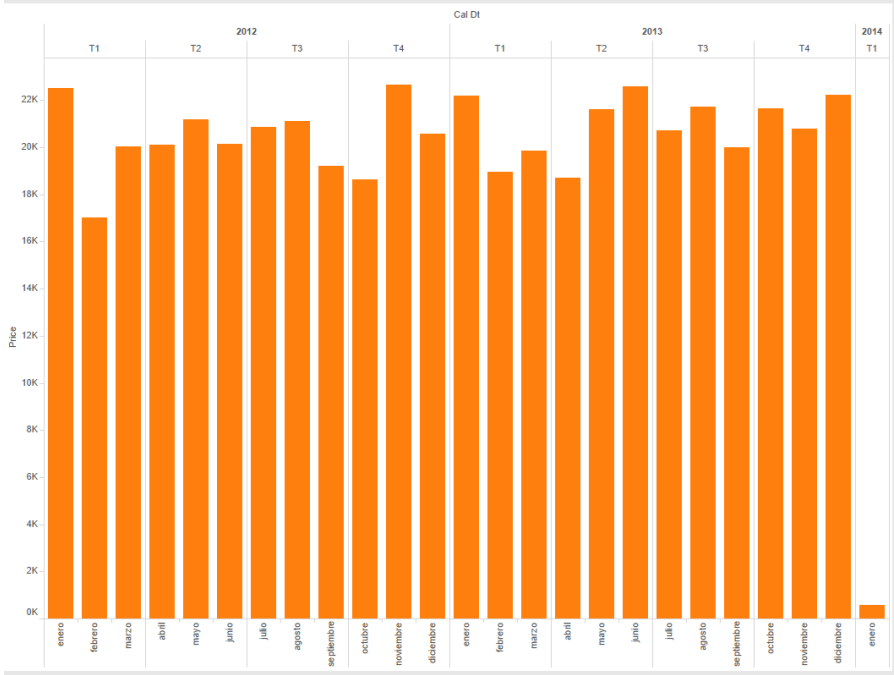
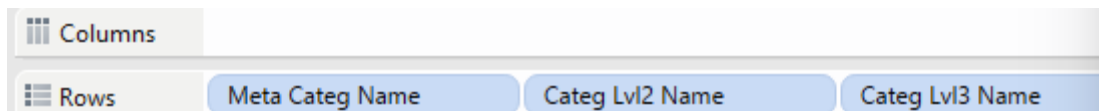To add sub-totals by category: Drag and Drop "Meta Categ Name" to "Color"

The result should be similar to:

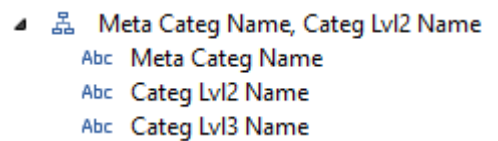# Second Worksheet

Create a new Worksheet

Drag and Drop, and configure if, as follows:

Then the relations between "Meta Categ Name", "L2" and "L3": can be seen.

Meta Categ Name	Categ Lvl2 Name	Categ Lvl3 Name
Abbigliamento e accessori	Donna: Accessori	SciarpFoulard e Scialli
Baby	Baby Clothing	Boys
		Unisex
	Nursery Decor	Night Lights
BookMagazines		Comic Books
	Children's Books	Children's Books
Books	First Editions	Other
Business & Industrial	Electrical & Test Equipment	Test Equipment
	Heavy Equipment	Antique & Vintage Farm Equip
	Light Equipment & Tools	Air Tools
	Manufacturing & Metalworking	Metalworking Tooling
	MRO & Industrial Supply	Pumps & Plumbing
	Printing & Graphic Arts	Commercial Printing Presses
	Retail & Services	Jewellery Packaging & Display
		Jewelry Packaging & Display
Cameras & Photo	Camera & Photo Accessories	LCD Hoods
	Film Photography	Other

Delete the three fields in "Rows" and generate a hierarchy using Dimensions Menu (on the Left)
Drag and Drop "Lvl2" over "Meta Categ Name" and after D & Drop "Lvl3", the new result should be:

Drag and Drop the New hierarchy on "Rows" and expand it:

Change the diagram type to table:

Drag and Drop "Price" to Rows, and watch the total price on the right hand side of table:

Meta Categ Name	Categ Lvl2 Name	
Abbigliamento e accessori	Donna: Accessori	76
Baby	Baby Clothing	1.241
	Nursery Decor	5.074

Now you can change the graph type:

Meta Categ Name	Categ Lvl2 Name	
Abbigliamento e accessori	Donna: Accessori	
Baby	Baby Clothing	
	Nursery Decor	
BookMagazines		
	Children's Books	

Create a Dashboard

Create a New Dashboard

Drag and Drop WorkSheet_1 and WorkSheet_2 to the new dashboard

Hoja 2

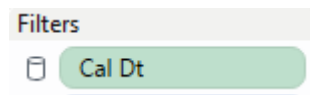# Add filter to dashboard

1º Add Filter to Worksheet_1 :

2º Configure the filter using "All Using this Data Source"
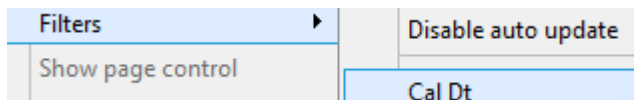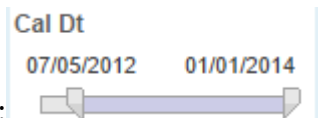

3º Then check the Worksheet_2 and, as a result, a new filter has been added:
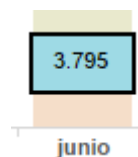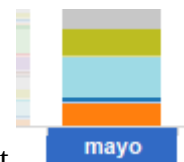

4º Add the filter to the dashboard: Select a Worksheet on the Dashboard, and right- click on the
upper edge

Filter > "Cal Dt"

After that, a new panel will appear on the right: . This filter will affect all
the Dashboard's Worksheets

Furthermore, you can filter by date clicking on month in the upper worksheet

Or, you can filter by category by clicking in category :
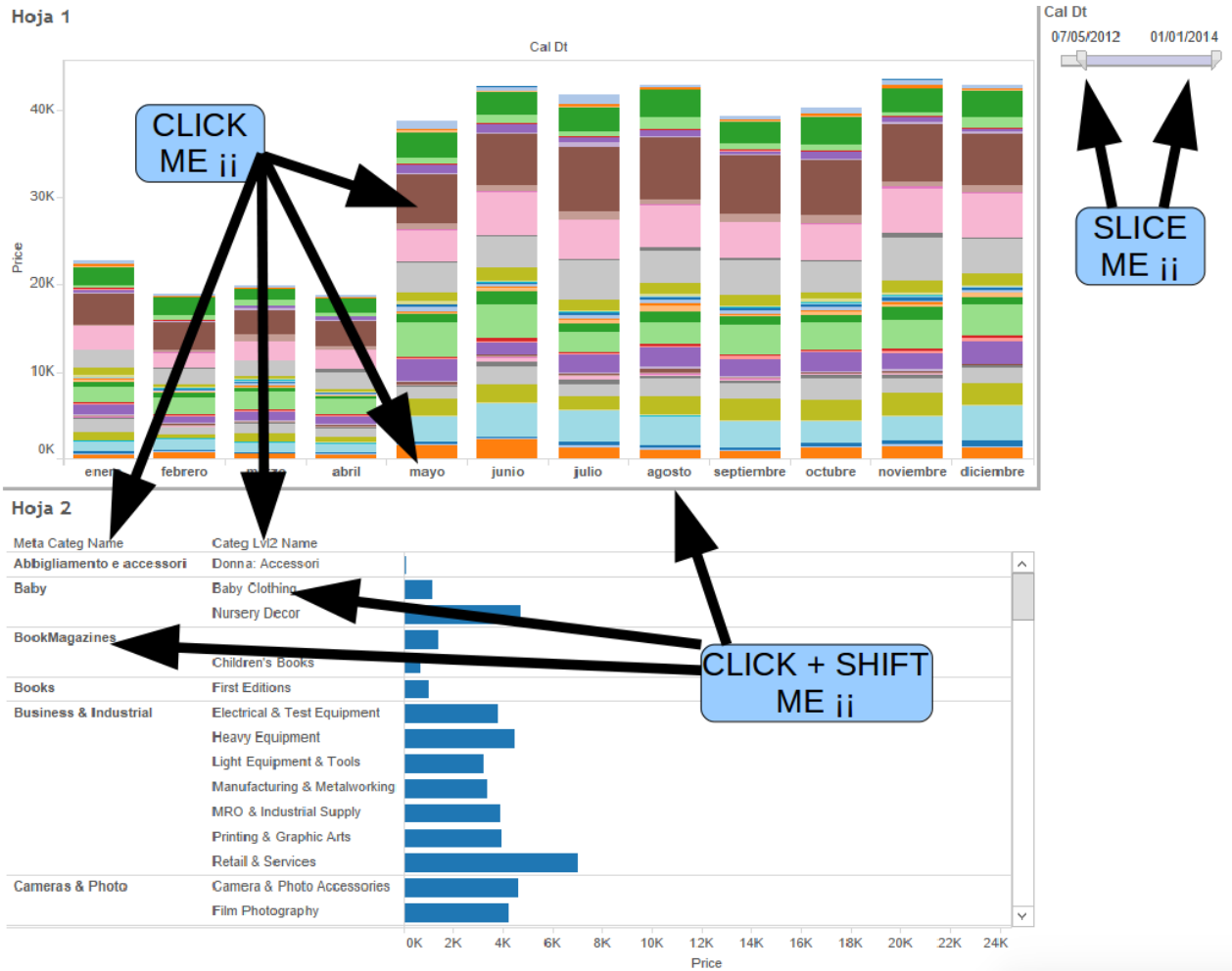
Final Result:

Tableau Files: Full.twb OnlyConnection.twb

For any suggestions, feel free to contact me
Thanks, Alberto